

Editor User Guide

State of North Carolina

April 2015

North Carolina Common Digital Experience: Unified Look & Feel

Drupal 7 Platform

Description

This guide is intended for users with basic content creator (Editor) permissions. The guide contains steps to help users understand how to create and manage content.

Table of Contents

Table of Contents.....	1
Document Change Index.....	3
1. Background	4
1.1 Drupal Overview.....	4
2. Workflow	5
2.1 User Roles	5
2.2 Moderation States	7
3. Accessing the CMS	8
3.1 Logging In	8
3.2 Logging Out.....	9
4. Using the Toolbar	9
5. Content Overview	10
5.1 WYSIWYG Editor.....	10
5.1.1 Common WYSIWYG Tasks.....	12
5.2 Related Content	18
5.3 Taxonomy	20
5.4 Revision Information	21
5.4.1 Managing an Existing Node.....	21
6. Creating Content.....	22
6.1 Site Page.....	23
6.2 Blog entry	24
6.3 Document	24
6.4 Event	25
6.5 Media Gallery	26
6.6 Photo	26
6.7 Press Release	26
6.8 Profile	27
6.9 Webform	28

7. Working with Content.....	30
7.1 Workbench.....	30
7.2 Activity: Creating a Site Page.....	30
7.3 Activity: Editing a Published Node.....	31
7.3.1 Selecting a Draft to Edit	31
7.3.2 Submitting the Draft.....	31
8. System Glossary.....	33



Document Change Index

Date	Change
4/07/2015	Initial draft (Version 1.0)



1. Background

This user guide provides an overview of the new Drupal Content Management System (CMS) and its capabilities. It also serves as a quick reference to help you with the basic steps to create, edit, and manage system content.

Drupal is a Content Management System that makes it easy for users to create and manage content by offering different templates for different types of content, taxonomy terms (“tags”) that users can add to content to help site visitors find it, and different means of surfacing content across a site.

1.1 Drupal Overview

The goal of the Drupal system is to help users compose and present website content of various types, such as articles, photos, and news releases. Rather than forcing users to specify a fixed, pre-declared arrangement of content, Drupal takes care of the details of how information is arranged and presented, and lets users focus on creating the actual content to be displayed.

Most of the content on a Drupal-based site is stored in a database. Text and images are submitted to this database by filling in structured forms (content types) via a web browser. There are many different content types from which to choose; some are very straightforward and meant to house generic content (e.g., a Site Page), while others should be used for a very specific purpose (e.g., an Event). *Section 6: Creating Content* contains more details about individual content types and their use cases.

When site visitors view a node (“node” is the Drupal term for the saved view of a content type), Drupal gets the relevant bits of content from the database and composes all of the components of the node in a template. This makes it easy to quickly add or change content without requiring knowledge of HTML or other web technologies on the part of the user creating the content.

Depending on the configuration of the Drupal site and the defined user roles on the site, you may be allowed to contribute and edit content and, for advanced users, administer various aspects of the site. Fortunately, Drupal is designed to make this relatively easy. Very little technical knowledge is assumed. Though details may vary with a site’s configuration, this user guide will explain the general steps to create and manage content on the new North Carolina Drupal platform. Use this guide to become familiar with the basics on how to use Drupal successfully.

For clarification of terms discussed throughout this guide, please see *Section 10: System Glossary*. For questions beyond the scope of this guide or for further training information, please contact your Account Manager or Training Lead.



2. Workflow

Workflow is a Drupal module that allows users to manage the status of content. The Workflow set up in the new NC Drupal platform is designed as a simple approval process allowing users to track and manage content changes. Editor users will have access to two Workflow states: “Draft” and “Needs Approval” (see *Section 2.2: Moderation States* for more details). Both states allow for creation of new content, but do not allow for immediate publishing of content.

The default save state of any new or existing content item is “Draft”. For Editor users who are not able to immediately publish content, there exists a special status to signal that content is ready for approval (“Needs Review”). Once content is marked as “Needs Review”, it will be highlighted for an advanced user, such as a Publisher, to approve content for publication.

	Draft	Needs Review	Published
Anonymous Site Visitor	N/A	N/A	N/A
Authenticated User	N/A	N/A	N/A
Editor	→	→	N/A
Event Creator	→	→	N/A
Publisher	→	→	→
Site Manager	→	→	→
Administrator	→	→	→

2.1 User Roles

In addition to Drupal’s default “Anonymous Site Visitor” and “Authenticated User” user roles, the NC platform will have the following roles in Workflow:



Drupal User Role	Description
Administrator (Admin)	A traditional Drupal “super-user” who can perform all site functions. This role will be restricted to a limited number of users.
Publisher	An advanced content creator role, where user is able to publish content.
Editor	A user who can create new draft content and edit existing content created by other Editors.

Roles outside of workflow include:

- **Anonymous Site Visitor:** A user part of the general public who is not logged into the CMS. This is an unauthenticated user who can only view nodes that are accessible to anyone
- **Authenticated User:** A user who has the same permissions as an Anonymous Site Visitor, but can also view content available to authenticated CMS users
- **Site Manager:** A user role specified for troubleshooting, fixing menus, and managing taxonomy vocabularies and user roles. This user is capable of ignoring workflow items. This user does *not* have complete access to site configuration features in the same way as an Admin user
- **Event Creator:** A user role specific for creating Event nodes

The table below contains the permissions for the roles outlined above:

	Create Content	Edit Own Content	Delete Own Content	Edit Any Content	Delete Any Content	Publish Content	Administer Menus	View Revisions	Revert Revisions	Configure Layout	Administer Taxonomy	Administer Users	Provision Agency Sites	Administer Permissions	Perform Technical Admin	Browse Content
Anonymous Site Visitor																•
Authenticated User																•
Editor	•	•	•													•
Publisher	•	•	•	•	•	•		•	•							•
Event Creator	•	•	•													•
Site Manager	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•
Administrator	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•



2.2 Moderation States

Workbench is the Drupal module used to provide an additional level of managing Drupal's core "unpublished" and "published" node states, affecting the behavior of node revisions when nodes are published. Not all content types use Workbench moderation states. When an Editor user creates or edits the content types that use Workbench, available moderation state options will be accessible.

Content Types using Workbench	Content Types not using Workbench
Blog entry	Event
Document	Media Gallery
Press Release	Photo
Site Page	Profile
	Webform

Below are the available Workbench moderation states:

- **Draft:** The default save state for any node. With Workbench, it is possible to create a new draft of content while the existing (published) version remains live
- **Needs Review:** The status used to signify that content is ready for publication. Pushing content from "Draft" to "Needs Review" signals that the content is ready for an authorized user to review and publish (or send back to "Draft" state for further revisions)
- **Published:** The state content is in when it is visible to a public, unauthenticated site visitor

Editor users have access to save content as "Draft" or "Needs Review".

The screenshot shows the Drupal Workbench interface for editing content. At the top, there's a navigation bar with 'Content', 'Add content', 'Find content', and 'Blocks'. Below this is a search bar and a button 'Add another item'. The main content area is divided into two sections: 'Revision information' on the left and 'Revision log message' on the right. The 'Revision information' section shows 'New revision' and a 'Moderation state' dropdown menu. The 'Revision log message' section shows 'Created by nceditor.' and a text area for adding a message. The 'Moderation state' dropdown menu is highlighted with an orange box, showing two options: 'Current: Draft' (selected) and 'Needs Review'. Below the dropdown are 'Save' and 'Preview' buttons.

Figure 1 Moderation states available to Editor users



3. Accessing the CMS

To create or edit content in the Drupal CMS, you must have a registered username and password. The NC Platform has been set up to recognize your Active Directory (LDAP) NCID. The same credentials you use to log into any other NC system should allow you access to the Drupal CMS.

3.1 Logging In

To log in to the CMS, navigate to the URL provided to you (e.g., “**your-site-name.nc.gov/user**”) and enter you NCID username and password.

A screenshot of the 'User account' login page. The title 'User account' is at the top left. Below it are two input fields: 'Username' with a red asterisk and 'Password' with a red asterisk. Below the 'Username' field is the text 'Enter your NCID'. Below the 'Password' field is the text 'Enter your NCID password'. At the bottom left is a dark blue button labeled 'Log in'.

Figure 2 User login screen

Once logged in, you will see your user profile. The “Edit” tab allows you access to make changes to your user profile (e.g., update your password & email address, and set notification & time zone preferences).

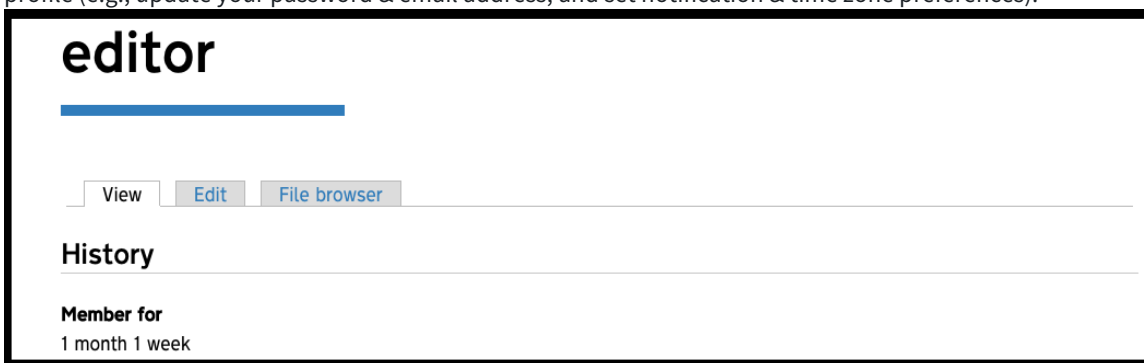
A screenshot of the 'editor' user profile page. The title 'editor' is at the top left. Below it are three tabs: 'View', 'Edit', and 'File browser'. Below the tabs is a section titled 'History'. At the bottom left, it says 'Member for' followed by '1 month 1 week'.

Figure 3 User profile account



3.2 Logging Out

To log out of the CMS, select “Log out” in the toolbar.



Figure 4 “Log out” appears as an option in the upper right corner of the screen when logged in

4. Using the Toolbar

If you are logged in as an Editor user, you will see a toolbar with shortcuts to create, edit, and manage site content.



Figure 4 Editor's toolbar

The top black toolbar contains the following items:

- **My Workbench:** A dashboard for you to access your content; also provides search tools and special views on your content
- **Content:** Add new and search for existing site content; while an Editor user is able to view all site content, you are only able to edit content items owned by other Editors
- **Hello <current user>:** Takes you to your account options and settings
- **Log out:** Ends your session

Under the top-level toolbar, you will see a lighter gray “Shortcut” bar. This bar has shortcuts to the most common tasks you’ll need to perform on the site:

- **Add content:** See a list of the types of content you can create, such as Events and Site Pages; this list reflects the privileges assigned to your user role
- **Find content:** Sort content by its type and publication status; use this feature for a general view of site content



5. Content Overview

When you create a piece of content in Drupal, the first thing you need to do is specify which **type** of content you want to create. Below is a list of content types available to Editor users in the CMS:

Content Type	Purpose
Blog entry	Single post to an online journal
Document	Attachment with information related to files such as docs and PDFs
Event	Information about a happening, including details of date, time, and location
Media Gallery	Collection of multimedia, such as photos and videos
Photo	An image and its metadata
Press Release	Traditional news release containing content about a new development or announcement
Profile	Information about an individual, which may be an author, a staff member, or even a business
Site Page	Simple page of static HTML content, used for general information that does not need to be frequently updated
Webform	Form or questionnaire accessible to site users and visitors. Submission results and statistics are recorded and accessible to privileged users

5.1 WYSIWYG Editor

The “What You See Is What You Get” text editor helps you format content with user-friendly button widgets, and “Text format” filters (note, access to filters is determined by user role). The WYSIWYG text editor is where the majority of your content will be housed; this applies to both new content, as well as changes made to existing content.



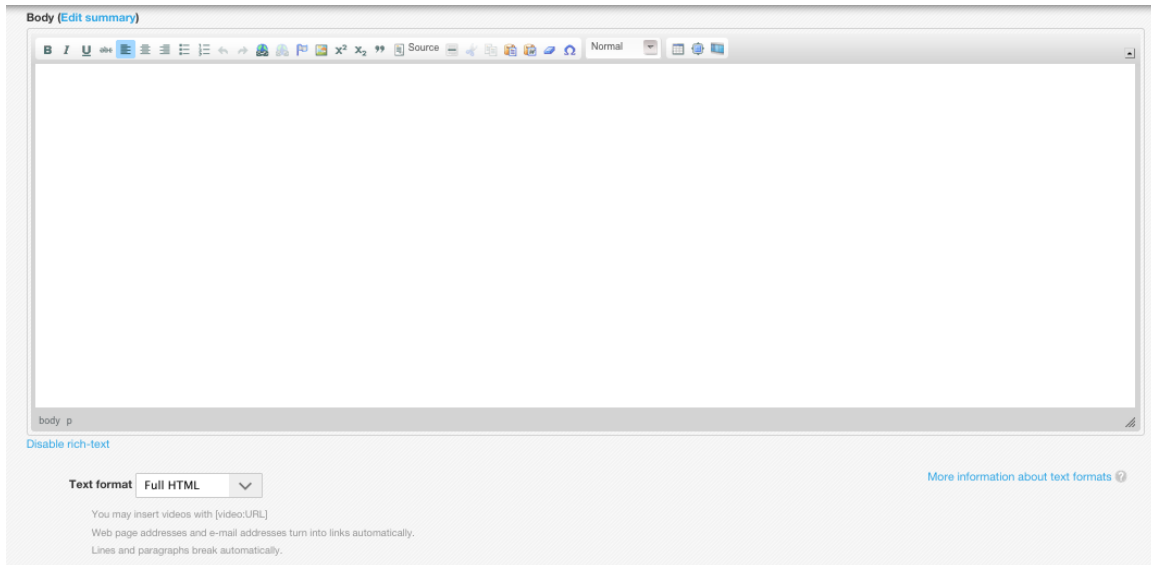


Figure 5 WYSIWYG Text Editor

In addition to formatting simple text, the WYSIWYG editor allows you to insert hyperlinks, add tables, upload images, reference videos, etc., all by way of single-icon buttons and dropdown lists (see table below).































					
Bold	<i>Italic</i>	Strikethrough	Align Left	Align Center	Align Right
					
Bulleted List	Numbered List	Undo	Redo	Link	Unlink
					
Anchor	Insert Image	Superscript	Subscript	Remove Format	View Source
					
Horizontal Line	Cut	Copy	Paste as Plain Text	Paste from Word	Blockquote
					
Special Characters	Table	Maximize Screen	Spellcheck	Video	Text Styles

Figure 7 WYSIWYG Button Widgets



5.1.1 Common WYSIWYG Tasks

This section contains information about the features most commonly used in the WYSIWYG text editor.

5.1.1.1 LINKING CONTENT

An Editor user can reference other content (within the CMS or outside of it) by using the WYSIWYG's "Link" button. "Link type" options include:

- **Internal path:** Existing CMS content that can be referenced via the following options:
 - Node ID (e.g., "node/123")
 - Relative path (e.g., "best-test-site-page")
 - Node title (e.g., "The Best Test Site Page"; the autocomplete field will pull from existing site content)
- **URL:** Link outside of the CMS (e.g., "http://www.ncopenbook.gov/Home.jsp")
- **Link to anchor in the text:** Points a site visitor to an anchor within the body content
- Note, an anchor must already exist before it can be referenced
- **E-mail:** Destination address, as well as optional fields to set default Message Subject & Message Body

5.1.1.2 UNLINKING CONTENT

An Editor user can quickly unlink content by highlighting an existing link and clicking the WYSIWYG "Unlink" button.

5.1.1.3 PLACING AN ANCHOR LINK

Adding an anchor link to body content is a two-step process. To create an anchor link (a link that will point to a different part of the same node), complete the following steps in the WYSIWYG:

- Place the cursor in the part of the body content (or highlight the body content) where you want the anchor to appear
- Select the **Anchor** button
- Enter a term in the **Anchor Name** field of the "Anchor Properties" window
- Select **OK** to create the anchor

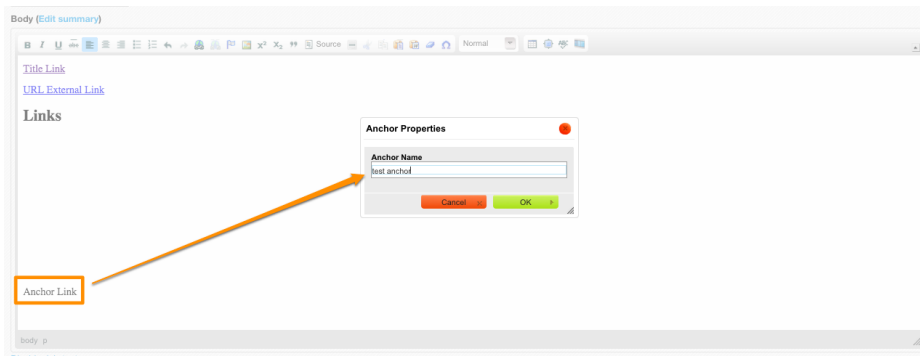


Figure 8 Placing an anchor link in the WYSIWYG



To reference an anchor link, complete the following steps:

- Select the **Link** button
- Select the Link type > Link to anchor in the text
- Select an available anchor from either the **By Anchor Name** or the **By Element ID** drop-down menus
- Select **OK** to create the anchor link

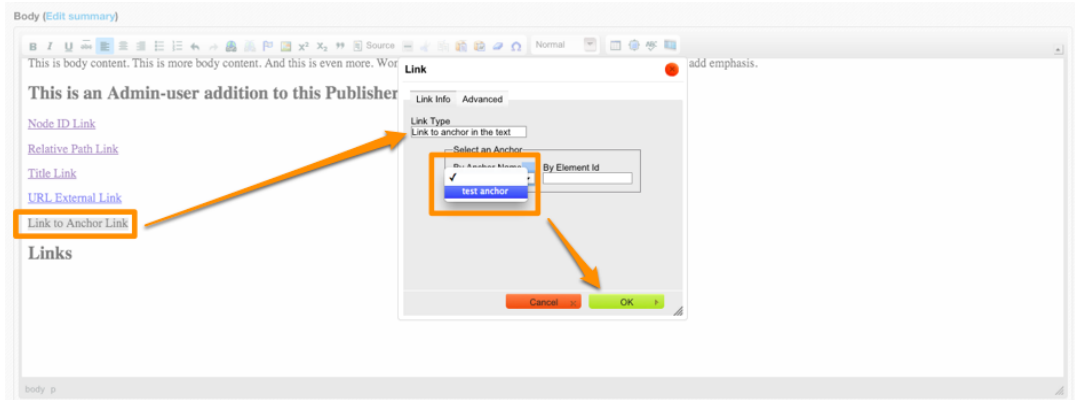


Figure 9 Referencing an anchor link in the WYSIWYG

5.1.1.4 UPLOADING IMAGES

An Editor user can upload new or find & place existing images using the IMCE Image Browser in the WYSIWYG.

- Select the **Image** button
- Select **Browse Server**

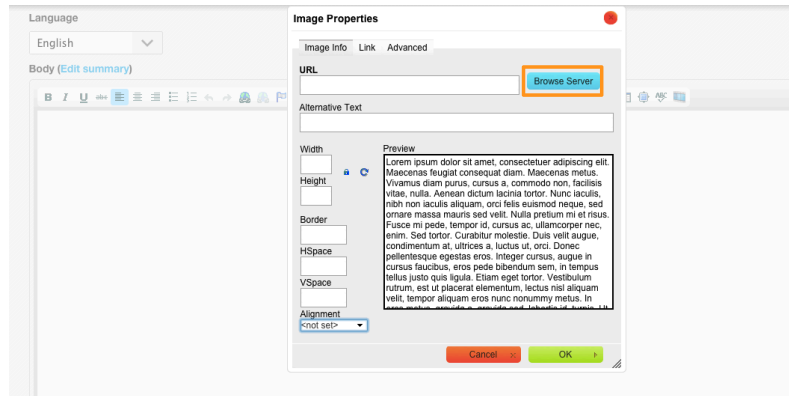


Figure 10 Prompting the IMCE image/file directory using “Browse Server” button

- To find and place an existing image, select an image in the “File name” list, then select Insert file
- To upload a new image, select **Upload > Choose file > Upload**



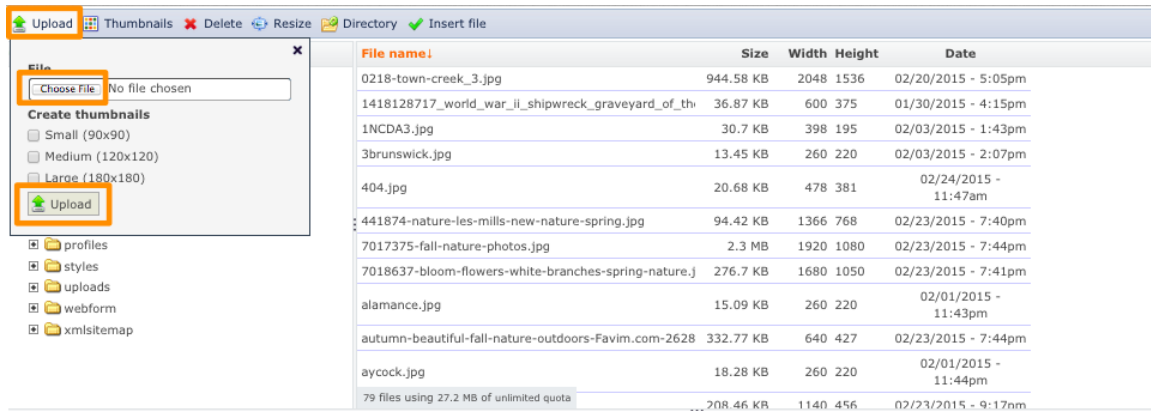


Figure 11 Uploading a new image using the IMCE image/file directory

- Once the new image is uploaded, select **Insert file**

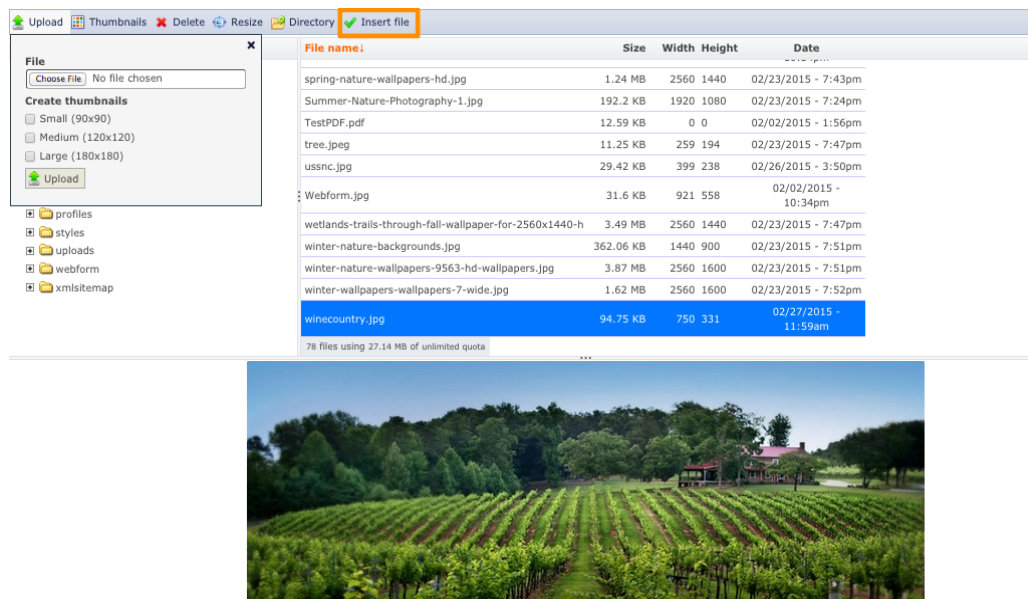


Figure 12 Inserting a newly uploaded image using the IMCE File Browser

- When the Image Properties dialog returns, enter some descriptive **Alternative Text** (used by screen-readers for users with visual impairments)
- Select **OK** to place the image in the body of the WYSIWYG



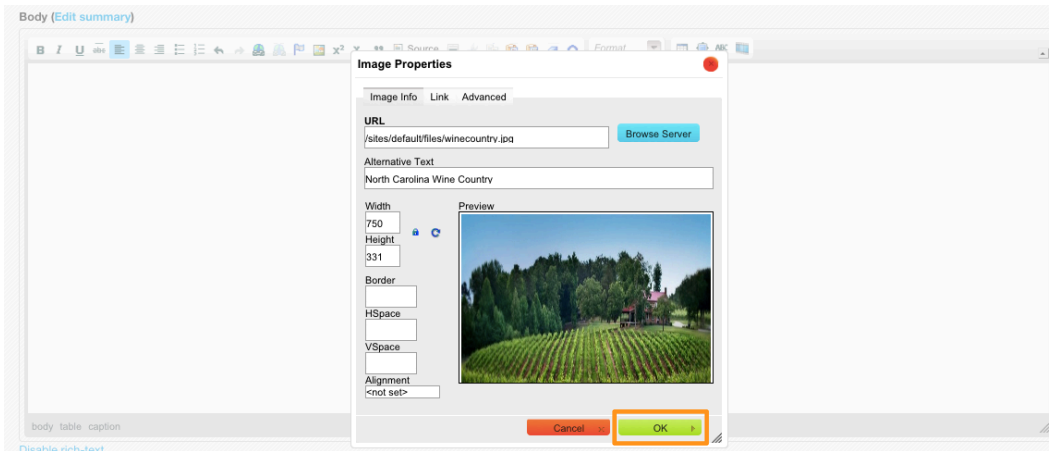


Figure 13 "Image Properties" dialog

Once an image is placed in the body content, a user can reactivate the **Image Properties** window by either double clicking on the image, or by right-clicking the image and selecting "Image Properties".

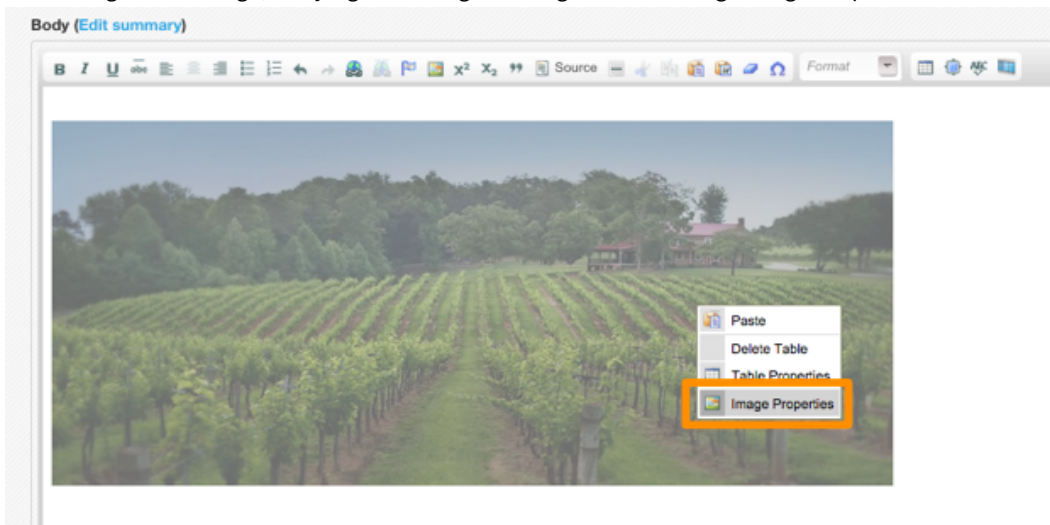


Figure 14 Reactivating the Image Properties window

5.1.1.5 PASTE FROM WORD

All users are encouraged to paste copied text into the WYSIWYG editor using the "Paste from Word" button. This module adjusts any existing text formatting in the pasted content, ensuring that the NC platform styles are applied consistently across a site. Note, this module should be used when pasting *any* content outside of the CMS (not only content from Microsoft Word). To use "Paste From Word" in the WYSIWYG:

- Select the **Paste from Word** button
- Paste any external system content into the Paste dialog



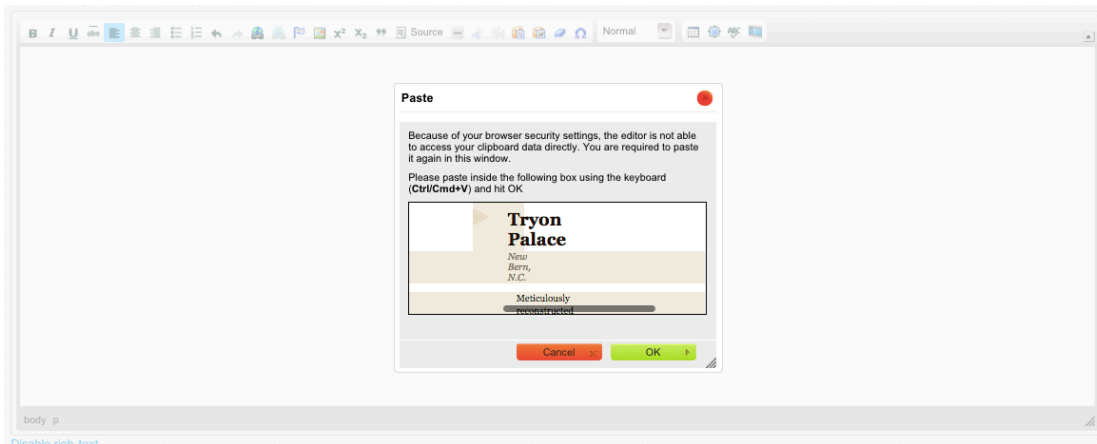


Figure 15 “Paste from Word” Paste dialog box

- Select **OK** to paste the content in the WYSIWYG

Note that the pasted content will display with appointed NC platform formatting, as well as retain any hyperlink formatting.

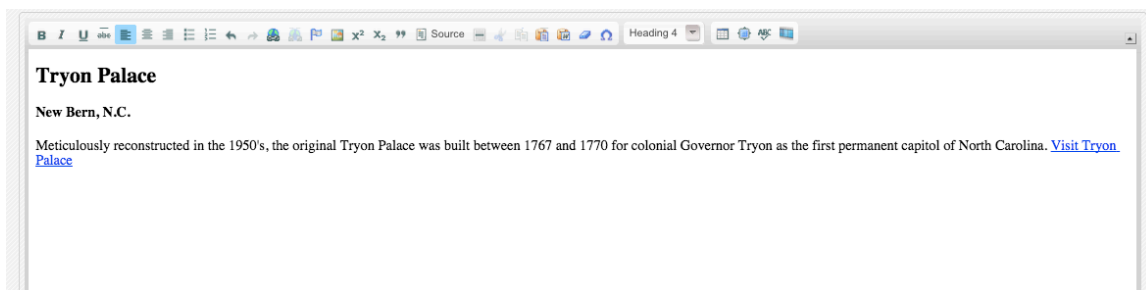


Figure 16 Preformatted text placed in WYSIWYG using the “Paste from Word” module

5.1.1.6 INSERTING A TABLE



An Editor user can place and format tabular data within the body of a node using the “Table” button. Note, tables should not be used in an attempt to reformat a node’s page layout. The fields of the **Table Properties** dialog include:

- **Rows & Columns:** Number of available cells
- **Width & Height:** Full table dimensions
- **Headers:** Options to have preset bold formatting apply to designated table regions
- **Cell spacing & Cell padding:** Borders given to individual table cells
- **Alignment:** Specific to table placement within body content
- **Caption:** Description that displays above the table
- **Summary:** Table metadata



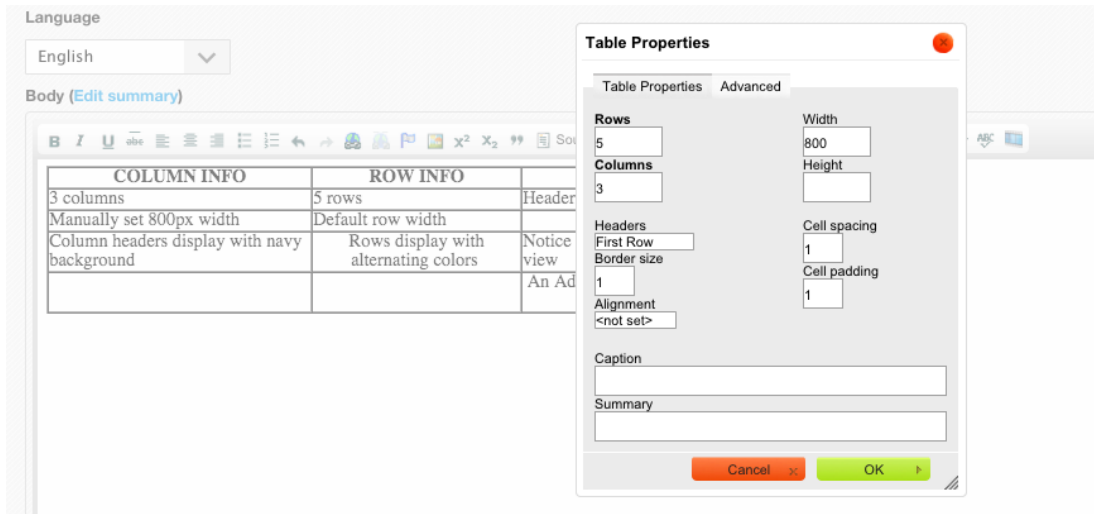


Figure 17 “Table Properties” dialog box

To edit the properties of an existing table, reactivate the “Table Properties” dialog by right clicking the table & selecting **Table Properties**.

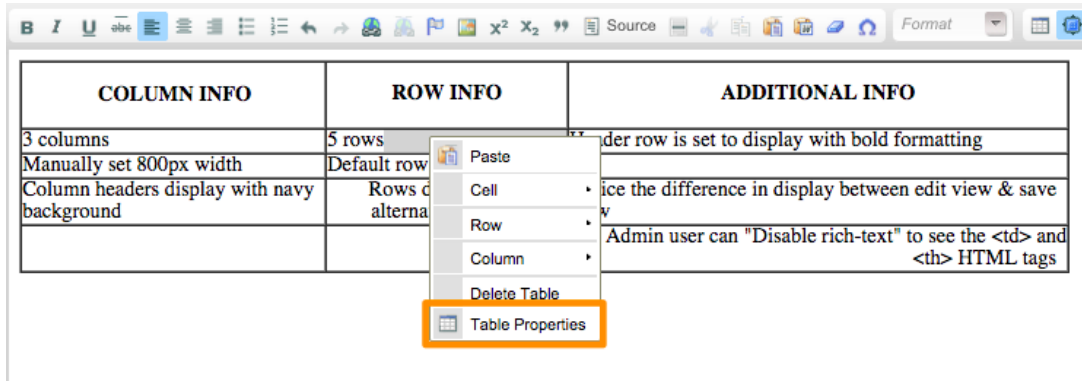


Figure 18 Reactivating the “Table Properties” dialog on an existing WYSIWYG table (edit view)

Notice the difference in display between a body table’s edit view and saved view (this results from the automatic application of preset NC platform site styles):



COLUMN INFO	ROW INFO	ADDITIONAL INFO
3 columns	5 rows	Header row is set to display with bold formatting
Manually set 800px width	Default row width	
Column headers display with navy background	Rows display with alternating colors	Notice the difference in display between edit view & save view
An Admin user can "Disable rich-text" to see the <td> and <th> HTML tags		

Figure 19 WYSIWYG Table (saved view)

5.2 Related Content

An Editor user is able to reference existing site content using the “Related Content” fields. Links referenced in this section will appear at the bottom of a node with a special treatment.

- **Title:** Text to appear as the link title; if left blank, the full link URL will display in the saved view
- **URL:** Link to external (outside of the CMS) or internal (within the CMS) content
 - External: Absolute URL required
 - Internal: Relative path or node ID required (see *Section 5.1.1.1: Linking Content* for details)

Figure 20 Related Content fields

If you wish to add more links, select the **Add another item** button and repeat the process.



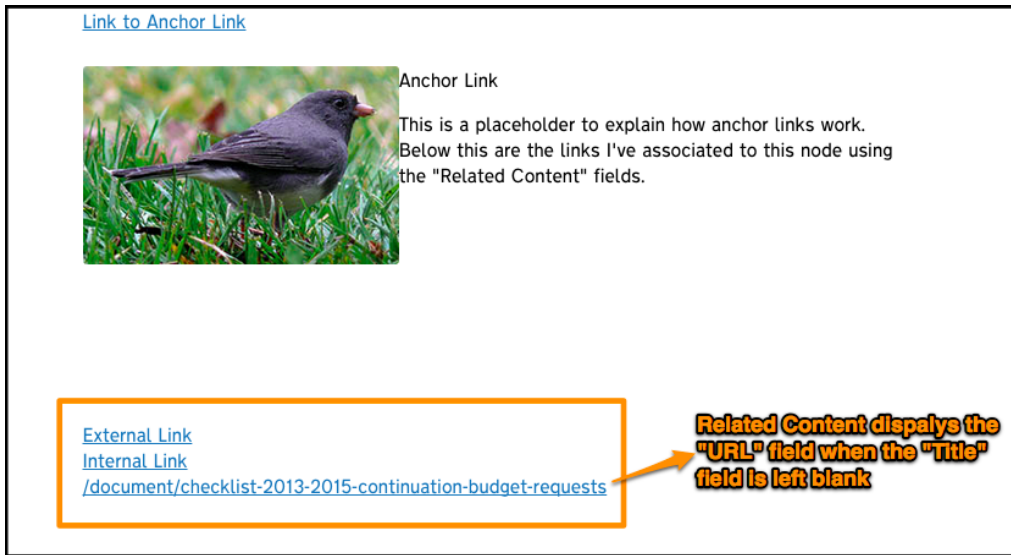


Figure 21 *Saved view of Related Content links*



5.3 Taxonomy

One of the easiest ways for content creators to classify and organize site content, which helps site visitors more easily find it, is to use Drupal's Taxonomy module. The Taxonomy module allows users to connect, relate, and classify site content. Most content types' edit views have associated taxonomies to help Editor users categorize content using vocabulary terms ("tags"). Vocabularies are a high-level container in which one or more terms can be defined. For example, the Event content type contains the following vocabularies:

- **Agency/Department:** Specific sections of an agency to which the content pertains
- **Event Terms:** The specific type of event (e.g., Conference, Training, Workshop); term selection displays with special treatment on the saved view of the Event detail node
- **Event Type:** The specific type of event (e.g., Conference, Training, Workshop); term selection helps site visitors filter the event on the "Upcoming Events" list page
- **Organizer:** Person or group responsible for hosting the event; term selection displays with special treatment directly on the saved view of the Event detail node

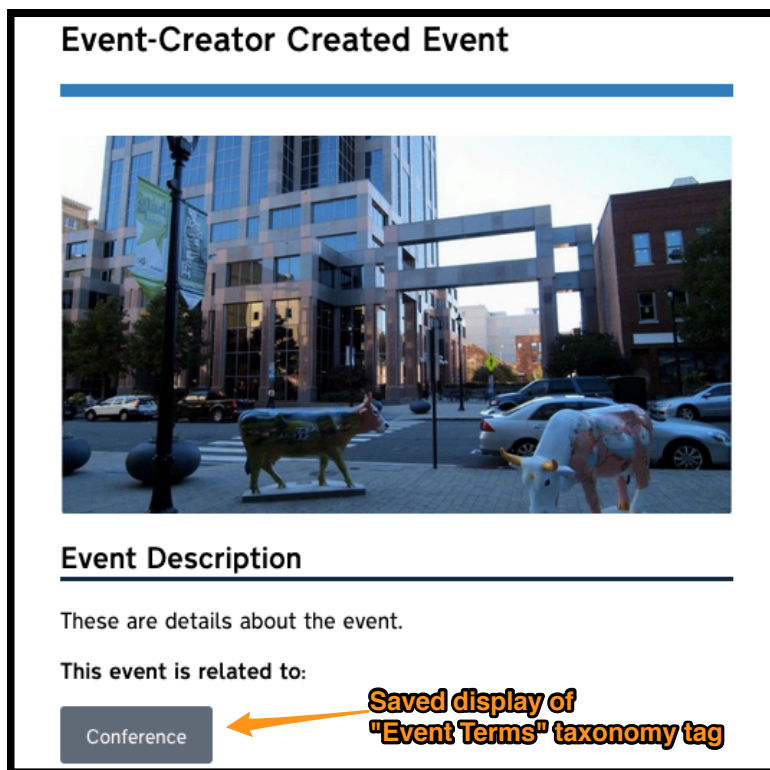


Figure 22 Example saved Event (detail node view) with selected "Event Terms" taxonomy tag

Once a tag has been applied to a saved node, it will help surface the content in different contexts across the site (i.e., an Event node tagged with "Conference" will be highlighted when a site visitor selects that term from the "Event Terms" filter on the "Upcoming Events" list page).



5.4 Revision Information

An Editor user will have access to node-specific “Revision information” at the bottom of every node’s edit view. The fields in this tab allow a user to log messages about changes made to the content, as well as set the moderation state of a node (“Draft” or “Needs Review”).

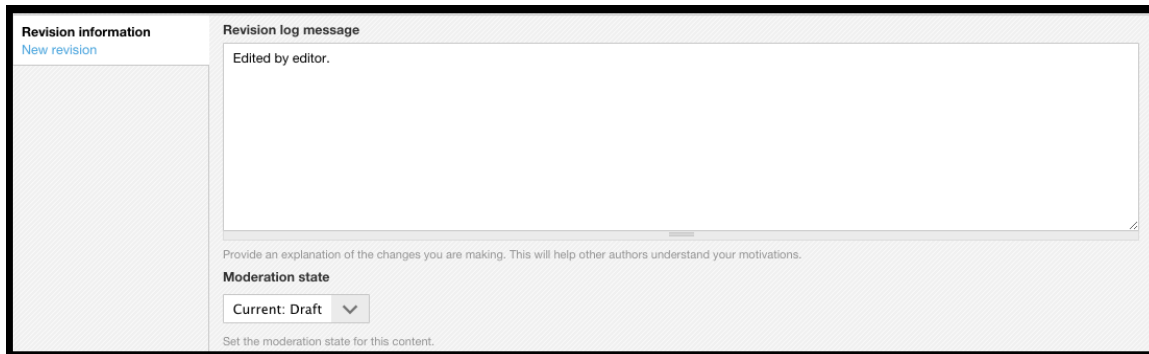
The screenshot shows a user interface for the 'Revision information' tab. On the left, there is a vertical sidebar with the title 'Revision information' and a link 'New revision'. The main area is divided into two sections. The top section, titled 'Revision log message', contains a text area with the placeholder text 'Edited by editor.' and a small icon in the bottom right corner. Below this is a text prompt: 'Provide an explanation of the changes you are making. This will help other authors understand your motivations.' The bottom section, titled 'Moderation state', features a dropdown menu currently set to 'Current: Draft' and a small icon to its right. Below the dropdown is a text prompt: 'Set the moderation state for this content.'

Figure 23 “Revision information” tab at bottom of every node’s edit view

5.4.1 Managing an Existing Node

When viewing existing site content, an Editor user can select from different tab options that help manage the node. Note, available tab options vary based on the content type and the state of the content.

The screenshot shows a page titled 'Editor Created Site Page'. Below the title is a horizontal bar with four tabs: 'View published', 'View draft', 'Edit draft', and 'Moderate'. The 'View published' tab is currently selected. Below the tabs, there is a yellow background area containing the text 'Revision state: Published' and 'Current draft: No'.

Figure 24 Node Management tabs available to an Editor user

- **View published:** View the most recently published version of a node; once a node is moderated to “Published”, a user is able to create a new draft, where changes can be made to existing content; this “View published” option will not appear if this is brand new content
 - Note, ability to moderate content to “Published” depends on user role; Editor users have access to save content as “Draft” or “Needs Review”, but are not able to immediately publish content
- **View draft:** View an in-progress draft version of the content; this option will not appear if there is no draft
- **Edit draft:** Content is presented in its form for user to update
- **Moderate:** Jump to a screen dedicated to showing the moderation (Workflow) history of the content item



6. Creating Content

An Editor is able to select from different content types when creating site content, allowing for information to appear in a pre-formatted way to site visitors. There are several ways to begin creating content. The simplest is to use the Shortcut Toolbar's **Add content** link. The entire content creation process typically takes only four steps:

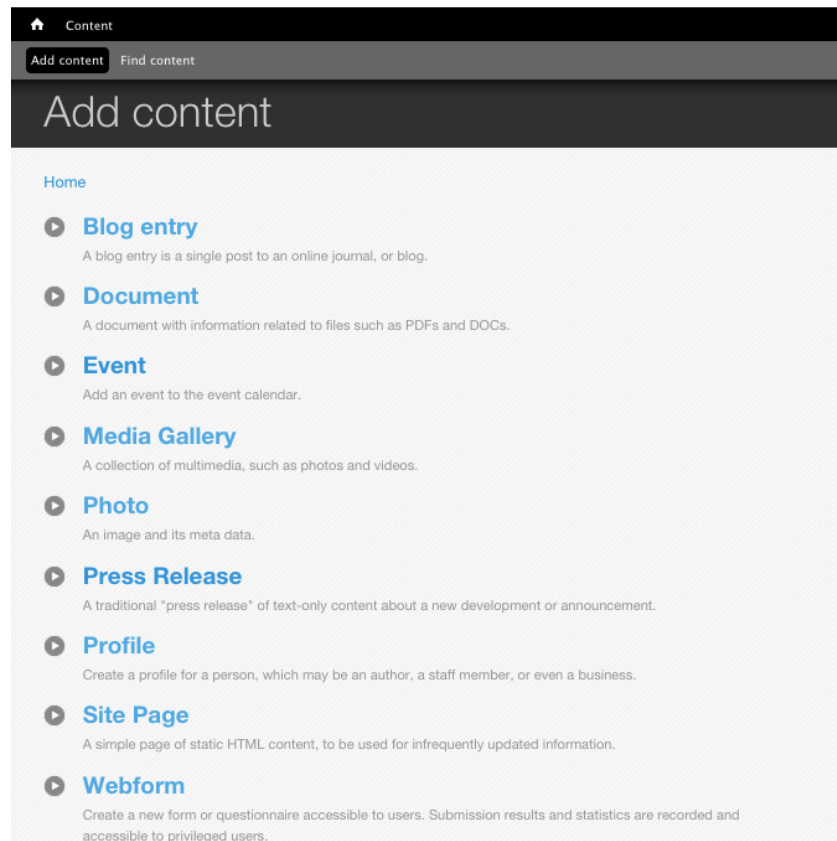


Figure 25 “Add content” screen

1. Select **Add content** from the shortcut toolbar
2. Select the type of content you would like to create from the “Add content” screen
3. The system will present the edit view of the form for that content type. The information you enter varies among the different content types:
 - a. Required fields are marked with an asterisk
 - b. The bottom of the edit view form always has a “Revision information” field, where an Editor user can select the desired moderation state (“Draft” or “Needs Review”)
4. When complete, select **Save** to create the node

Another way to create new content is to use the **Content** link in the primary toolbar.

1. Select **Content** from the primary toolbar
2. The “Content” screen will list all recent content; near the top of the screen, select **Add content**



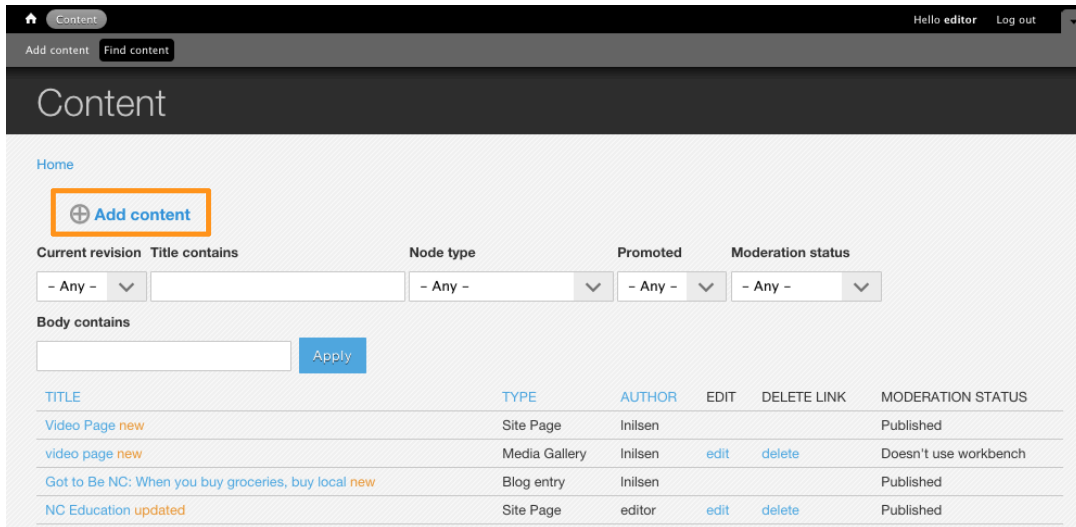


Figure 26 The “Content” screen with the “Add content” button

3. Select the type of content you would like to create from the “Add content” screen

Below are details of the platform-provided special features for individual content types.

6.1 Site Page

The Site Page content type is a simple page of static HTML content that is used for information that does not need to be frequently updated. This content type is the most frequently used for general site content.

- **Title:** Plain text field for unique title of the Site Page. **This field is required**
- **Language:** Defaults to “Language neutral”, allowing all site visitors to view all content; “English” and “Spanish” options are to be used when translated versions of content are needed
- **Summary:** Plain textarea for teaser of the Site Page content; activated by selecting the “Edit summary” link next to the title of the “Body” field; if this field is left blank, a trimmed value of the full Body text will display as a teaser
- **Body:** WYSIWYG enabled field allowing for special text treatments
- **Main Image:** Full-width image that will display at the top of the node’s saved view; allowed file types include png, gif, jpg, and jpeg, and must be no larger than 200 MB
- **Related Content:** Widget used to add available content to the Site Page; multiple nodes can be added to a single Site Page; once nodes placed, can reposition using the drag-and-drop functionality
 - Title: Text to appear in lieu of URL link
 - URL: The necessary link, either off-site (external) or within the CMS (internal); external links require an absolute path (e.g., <http://abc11.com/politics/nc-senate-gives-final-ok-to-gas-tax-changes/514829/>); internal links only require a relative path (e.g., /about-us, or node/15)
- **Thumbnail Image:** Image that is shown when the Site Page is displayed in a list; allowed file types include png, gif, jpg, and jpeg, and must be no larger than 200 MB
- **Files:** Associated content that can be added as an attachment to the Site Page; allowed file types include doc, docx, xls, xlsx, ppt, pptx, pdf, and txt, and must be no larger than 200 MB
- **Key Search Topics:** Field where user can add “free tags”; terms entered here will be highlighted with a special treatment on the Search Results list page when a site visitor searches for content using the exact term; multiple (comma separated) terms may be entered



6.2 Blog entry

The Blog entry content type is a single post to an online journal, or blog.

- **Language:** Defaults to “Language neutral”, allowing all site visitors to view all content; “English” and “Spanish” options are to be used when translated versions of content are needed
- **Title:** Plain text field for unique title of the Blog entry. **This field is required**
- **Release Date:** Date that will appear at the top of the content on the saved view
- **Author:** Creator to whom the Blog entry will be attributed to; note, this field pulls from existing Profile nodes (see *Section 6.8: Profile*); to reference an author, a separate Profile content type must already exist
 - Note, if an author does not have an existing Profile node, you can create a new Profile node by selecting **Create Profile**
- **Summary:** Plain textarea for teaser of the Blog entry content; activated by selecting the “Edit summary” link next to the title of the “Body” field; if this field is left blank, a trimmed value of the full Body text will display as a teaser
- **Body:** WYSIWYG enabled field allowing for special text treatments
- **Files:** Associated content that can be added as an attachment to the Blog entry; allowed file types include doc, docx, xls, xlsx, ppt, pptx, pdf, and txt, and must be no larger than 200 MB
- **Thumbnail Image:** Image that is shown when the Blog entry is displayed in a list; allowed file types include png, gif, jpg, and jpeg, and must be no larger than 200 MB
- **Main Image:** Full-width image that will display at the top of the node’s saved view; allowed file types include png, gif, jpg, and jpeg, and must be no larger than 200 MB. **This field is required**
- **Blog Terms:** Taxonomy term (“tag”) that can be applied to the Blog entry to help site visitors filter searching for the content

6.3 Document

The Document content type contains an attachment with information related to files such as docs and PDFs.

- **Language:** Defaults to “Language neutral”, allowing all site visitors to view all content; “English” and “Spanish” options are to be used when translated versions of content are needed
- **Title:** Plain text field for unique title of the Document. **This field is required**
- **Summary:** Plain textarea for teaser of the Document content; activated by selecting the “Edit summary” link next to the title of the “Body” field; if this field is left blank, a trimmed value of the full Body text will display as a teaser
- **Body:** WYSIWYG enabled field allowing for special text treatments
- **Agency/Department:** Taxonomy term (“tag”) that can be applied to the Document to help site visitors filter searching for the content; if selected, this will appear with a special treatment at the bottom of the saved view
- **Document Author:** Plain textfield for the creator to whom the Document will be attributed
- **Related Content:** Widget used to add available content to the Document; multiple nodes can be added to a single Document; once nodes placed, can reposition using the drag-and-drop functionality
 - **Title:** Text to appear in lieu of URL link
 - **URL:** The necessary link, either off-site (external) or within the CMS (internal); external links require an absolute path (e.g., <http://abc11.com/politics/nc-senate-gives-final-ok-to-gas-tax-changes/514829/>); internal links only require a relative path (e.g., /about-us, or node/15)
- **Document Type:** Radio button options of taxonomy term used to define the type of attachment (e.g., Bulletin, Manual, Policy); if selected, this will appear with a special treatment at the bottom of the saved view



- **Attachment:** The file attachment(s) to be associated with the Document node; file types include doc, docx, xls, xlsx, ppt, pptx, pdf, and txt, and must be no larger than 200 MB; note, multiple files may be uploaded. **This field is required**
- **Key Search Topics:** Field where user can add “free tags”; terms entered here will be highlighted with a special treatment on the Search Results list page when a site visitor searches for content using the exact term; multiple (comma separated) terms may be entered
- **Thumbnail Image:** Image that is shown when the Document is displayed in a list; allowed file types include png, gif, jpg, and jpeg, and must be no larger than 200 MB
- **Official title:** The title that will appear on the Document detail view
- **First Published > Date:** Date when Document was first published
- **Last Updated > Date:** Date when Document was last updated

6.4 Event

The Event content type contains the details of a happening, including details of date, time, and location.

- **Title:** Plain text field for unique title of the Event. **This field is required**
- **Language:** Defaults to “Language neutral”, allowing all site visitors to view all content; “English” and “Spanish” options are to be used when translated versions of content are needed
- **Dates:** The date and time of the event. **This field is required**
- **Show End Date:** Checkbox that, if enabled, will allow a user to add the end date and time of the event
- **Location:** Multiple fields specifying the event location’s street address; if content is entered in these fields, it displays in the right column of the event’s “When and Where” section
- **Virtual Location:** Information for online access to an event; if content is entered in this field, it displays in the right column of the event’s “When and Where” section, under the street address
- **Cost:** Any fees associated with the event; if content is entered in this field, it displays in the right column of the event’s “When and Where” section, under the virtual location information
- **Main Image:** Full-width image that will display at the top of the node’s saved view; allowed file types include png, gif, jpg, and jpeg, and must be no larger than 200 MB
- **Summary:** Plain textarea for teaser of the Event content; activated by selecting the “Edit summary” link next to the title of the “Event Description” field; if this field is left blank, a trimmed value of the full Event Description text will display as a teaser
- **Event Description:** WYSIWYG enabled field allowing for special text treatments
- **Agency/Department:** Taxonomy term (“tag”) that can be applied to the Event to help site visitors filter searching for the content; if selected, this will appear with a special treatment at the bottom of the saved view
- **Event Terms:** The specific type of event (e.g., Conference, Training, Workshop); term selection displays with special treatment on the saved view of the Event detail node
- **Event Type:** The specific type of event (e.g., Conference, Training, Workshop); term selection helps site visitors filter the event on the “Upcoming Events” list page
- **Organizer:** Person or group responsible for hosting the event; term selection displays with special treatment directly on the saved view of the Event detail node
- **External URL:** Title and URL for more information (not within the CMS) about the Event; if content is entered in this field, it displays in the right column under the event’s “Organizer” section
- **Related Content:** Widget used to add available content to the Event; multiple nodes can be added to a single Event; once nodes placed, can reposition using the drag-and-drop functionality
 - Title: Text to appear in lieu of URL link
 - URL: The necessary link, either off-site (external) or within the CMS (internal); external links require an absolute path (e.g., <http://abc11.com/politics/nc-senate-gives-final-ok-to-gas-tax-changes/514829/>); internal links only require a relative path (e.g., /about-us, or node/15)



- **Files:** Associated content that can be added as an attachment to the Event; allowed file types include doc, docx, xls, xlsx, ppt, pptx, pdf, and txt, and must be no larger than 200 MB
- **Key Search Topics:** Field where user can add “free tags”; terms entered here will be highlighted with a special treatment on the Search Results list page when a site visitor searches for content using the exact term; multiple (comma separated) terms may be entered

6.5 Media Gallery

The Media Gallery content type is a collection of multimedia, such as photos and videos.

- **Title:** Plain text field for unique title of the Media Gallery. **This field is required**
- **Summary:** Plain textarea for teaser of the Media Gallery content; activated by selecting the “Edit summary” link next to the title of the fuller “Summary” field; if this field is left blank, a trimmed value of the full Summary text will display as a teaser
- **Summary:** WYSIWYG enabled field allowing for special text treatments
- **MEDIA:** Field with autocomplete functionality for a user to reference existing Photo nodes (see *Section 6.6: Photo*); note, multiple Photos can be added by selecting the “Add another item” button
 - Note, if a Photo node does not already exist, you can create a new Photo node by selecting **Create Photo**
- **Language:** Defaults to “Language neutral”, allowing all site visitors to view all content; “English” and “Spanish” options are to be used when translated versions of content are needed

6.6 Photo

The Photo content type contains an image and its metadata.

- **Title:** Plain text field for unique title of the Photo. **This field is required**
- **Image:** Full-width image that will display at the top of the node’s saved view; allowed file types include png, gif, jpg, and jpeg, and must be no larger than 200 MB
- **Summary:** Plain textarea for teaser of the Photo content; activated by selecting the “Edit summary” link next to the title of the “Body” field; if this field is left blank, a trimmed value of the full Body text will display as a teaser
- **Body:** WYSIWYG enabled field allowing for special text treatments
- **Language:** Defaults to “Language neutral”, allowing all site visitors to view all content; “English” and “Spanish” options are to be used when translated versions of content are needed
- **Author:** Creator to whom the Blog entry will be attributed to; note, this field pulls from existing Profile nodes (see *Section 6.8: Profile*); to reference an author, a separate Profile content type must already exist
 - Note, if an author does not have an existing Profile node, you can create a new Profile node by selecting **Create Profile**

6.7 Press Release

The Press Release content type is a traditional news release containing text-only content about a new development or announcement.

- **Title:** Plain text field for unique title of the Press Release. **This field is required**
- **Language:** Defaults to “Language neutral”, allowing all site visitors to view all content; “English” and “Spanish” options are to be used when translated versions of content are needed
- **Release Date:** Date that will appear at the top of the content with a special treatment on the saved view



- **Related Content:** Widget used to add available content to the Press Release; multiple nodes can be added to a single Press Release; once nodes placed, can reposition using the drag-and-drop functionality
 - Title: Text to appear in lieu of URL link
 - URL: The necessary link, either off-site (external) or within the CMS (internal); external links require an absolute path (e.g., <http://abc11.com/politics/nc-senate-gives-final-ok-to-gas-tax-changes/514829/>); internal links only require a relative path (e.g., /about-us, or node/15)
- **City/Location:** Place related to the content in the Press Release; this appears at the top of the saved view. **This field is required**
- **Summary:** Plain textarea for teaser of the Press Release content; activated by selecting the “Edit summary” link next to the title of the “Body” field; if this field is left blank, a trimmed value of the full Body text will display as a teaser
- **Body:** WYSIWYG enabled field allowing for special text treatments
- **Image:** Full-width image that will display at the top of the node’s saved view; allowed file types include png, gif, jpg, and jpeg, and must be no larger than 200 MB
- **Files:** Associated content that can be added as an attachment to the Press Release; allowed file types include doc, docx, xls, xlsx, ppt, pptx, pdf, and txt, and must be no larger than 200 MB
- **Press Release Terms:** The specific type of press release (e.g., Breaking News, Bulletin, Newsletter); if a selection is made here, the term appears at the bottom of the saved view with special treatment; the term selection also helps site visitors filter the press release on the “Press Releases” list page
- **Agency/Department:** Taxonomy term (“tag”) that can be applied to the Press Release to help site visitors filter searching for the content; if selected, this will appear with a special treatment at the bottom of the saved view
- **Key Search Topics:** Field where user can add “free tags”; terms entered here will be highlighted with a special treatment on the Search Results list page when a site visitor searches for content using the exact term; multiple (comma separated) terms may be entered
- **Thumbnail Image:** Image that is shown when the Press Release is displayed in a list; allowed file types include png, gif, jpg, and jpeg, and must be no larger than 200 MB

6.8 Profile

The Profile content type is meant for information about an individual, which may be an author, a staff member, or even a business.

- **Full Name:** This is set by populating the First Name and Last Name fields. **This field is required**
- **First Name:** First name of individual
- **Last Name:** Last name of individual
- **Organization:** The organization to which the individual or group belongs; if populated, this content will display with a special treatment as part of the “Job Title” subheading on the saved view
- **Division:** Specific information about the individual’s or group’s position within the organization
- **Summary:** Plain textarea for teaser of the Profile content; activated by selecting the “Edit summary” link next to the title of the “Biography” field; if this field is left blank, a trimmed value of the full Biography text will display as a teaser
- **Biography:** WYSIWYG enabled field allowing for special text treatments
- **Photo:** Image that will display at the top of the node’s saved view; allowed file types include png, gif, jpg, and jpeg, and must be no larger than 200 MB
- **Associated User:** Drupal user account to associate with the Profile node
- **Phone Number:** Associated phone number for individual or organization; this will display with a special treatment in the right rail of the saved view



- **Email Address:** Associated email address for individual or organization; this will display with a special treatment in the right rail of the saved view
- **Address:** Plain textarea for individual's or organization's location; this will display with a special treatment in the right rail of the saved view
- **Staff Member:** Checkbox that, if enabled, will not add the Profile node to the "Leadership" list page
- **Leadership:** Checkbox that, if enabled, will automatically add the Profile node to the "Leadership" list page
- **Job Title:** Individual's position; this will display with a special treatment as a subheading on the saved view
- **Department:** Specific information about the individual's or group's position within the organization
- **Social Media:** Textarea for social media accounts (e.g., Facebook, Twitter, RSS Feed, YouTube) associated with the individual or organization; multiple (comma-separated) absolute URLs for different social links can be added; if content is added, it will appear with a special treatment in the right rail of the saved view

6.9 Webform

The Webform content type contains a form or questionnaire accessible to users. Submission results and statistics are recorded and accessible to privileged users.

- **Title:** Plain text field for unique title of the Webform. **This field is required**
- **Summary:** Plain textarea for teaser of the Webform content; activated by selecting the "Edit summary" link next to the title of the "Body" field; if this field is left blank, a trimmed value of the full Body text will display as a teaser
- **Body:** WYSIWYG enabled field allowing for special text treatments
- **Language:** Defaults to "Language neutral", allowing all site visitors to view all content; "English" and "Spanish" options are to be used when translated versions of content are needed

Once a Webform's initial edit view is saved, a user will see a new set of fields from which to select and set components of the Webform.

- **Label:** Plain text field for unique title of the field
- **Type:** Different options for form fields; options include:
 - Date: Allows site visitor to select the date (day, month, year)
 - E-mail: Allows a site visitor to enter their email address in a textfield
 - Fieldset: Allows Webform creator to add content, such as instructions explaining the purpose of a subsequent field
 - File: Allows a site visitor to upload an attachment to their Webform submission
 - Grid: Tabular field that allows a site visitor to provide weighted responses to individual questions
 - Hidden: Allows Webform creator to add notes to the Webform; this field does not display to site visitors on the saved Webform
 - Markup: Allows Webform creator to add content that requires markup (e.g., a map) in order to render on the saved Webform
 - Number: Allows site visitor to select from a dropdown list of preset numerical options
 - Page break: Inserts a button in a multi-page Webform; best used on Webforms that have conditional formatting
 - Select options: Allows site visitor to select from a dropdown list of preset options
 - Textarea: Allows site visitor to enter content (e.g., feedback) into a textarea
 - Textfield: Allows site visitor to enter content (e.g., a brief response to a question) into a textfield
 - Time: Allows site visitor to enter the hour and minute



- **Mandatory:** Checkbox that, if enabled, will require the site visitor to populate or select from the field before being able to submit the Webform
- **Operations:** Options of “Edit”, “Clone”, and “Delete” that display once a field has been added to the Webform
- **Edit:** Opens up the edit view of the specific field
- **Clone:** Creates an exact copy of the field, which can then be edited if any changes are necessary
- **Delete:** Removes the field from the Webform



7. Working with Content

While an Editor user is able to view any site content, the user is only permitted to edit existing site content created by other Editor users. This section contains information and instructions on how to create a brand new content item, as well as how to edit an existing content item to which you have permissions to edit.

7.1 Workbench

“My Workbench” allows a user to see all their content. To view My Workbench:

- Select **My Workbench** from the main toolbar
- **My content > My Edits:** Content items most recently created or edited by the individual Editor user (list displays up to five nodes)
- **All Recent Content:** Full list of site content, listed in the order of most recently updated nodes; note, an Editor user will not see the “edit” option in the ACTIONS column of content items owned by other user roles
- **My drafts:** Content items that the Editor user has created or edited, in either “Draft” or “Needs Review” state; note, the “Needs Review” state is technically unpublished, hence why nodes in that moderation state display in this section of My Workbench
- **Needs review:** Content items in “Needs Review” state that the Editor user has created or edited

7.2 Activity: Creating a Site Page

This example walks a user with Editor permissions through creating a Site Page content type.

1. From the gray Shortcuts toolbar, select **Add content**



Figure __ “Add content” option in Shortcuts toolbar

2. Select **Site Page** from the list of content types
3. On the edit view form, add a **Title**. The title should be unique for the node, as it will be used in the node’s URL and in the user interface
4. You can enter a teaser of the content by enabling the **Edit summary** field; if left blank, a trimmed value of the full Body text will be displayed as a teaser in specific instances across the site
5. **Body:** Add some text in the Body field
 - a. Add paragraph headers using the **Format** drop-down menu
 - b. Link a portion of the body content using the **Link** button
 - c. Add an image using the **Image** button
6. **Related Content:** Reference an internal and external piece of content
 - a. **Internal:** Add a Title and reference an existing node using either the node’s title or the node’s ID (e.g., “node/123”)
 - b. **External:** Add a Title and enter a the full URL of the external site content
7. **Main Image:** Upload a new image
8. **Add a new File:** Upload a new file attachment
9. **Key Search Topics:** Enter a term that will highlight the node should a site visitor search for it using the specified term



10. At the bottom of the edit view, select **Save**

7.3 Activity: Editing a Published Node

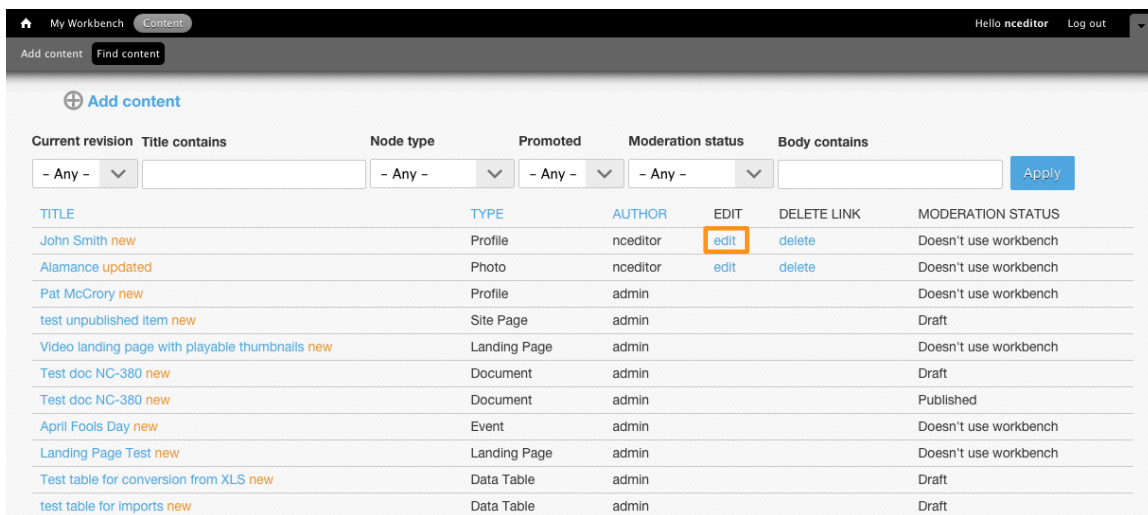
This example walks a user with Editor permissions through editing an existing node.

7.3.1 Selecting a Draft to Edit

To see a list of saved content you can access, complete the following steps:

- Select **My Workbench** from the toolbar
- Find a node from the **All Recent Content** section that is owned by you (or another Editor user), and select **edit** from the ACTIONS column

Alternatively, you may select **Content** from the main toolbar, see a full list of all site content, and select “edit” from the EDIT column of a content item owned by you (or another Editor user).



TITLE	TYPE	AUTHOR	EDIT	DELETE LINK	MODERATION STATUS
John Smith <small>new</small>	Profile	nceditor	edit	delete	Doesn't use workbench
Alamance <small>updated</small>	Photo	nceditor	edit	delete	Doesn't use workbench
Pat McCrory <small>new</small>	Profile	admin			Doesn't use workbench
test unpublished item <small>new</small>	Site Page	admin			Draft
Video landing page with playable thumbnails <small>new</small>	Landing Page	admin			Doesn't use workbench
Test doc NC-380 <small>new</small>	Document	admin			Draft
Test doc NC-380 <small>new</small>	Document	admin			Published
April Fools Day <small>new</small>	Event	admin			Doesn't use workbench
Landing Page Test <small>new</small>	Landing Page	admin			Doesn't use workbench
Test table for conversion from XLS <small>new</small>	Data Table	admin			Draft
test table for imports <small>new</small>	Data Table	admin			Draft

Figure __ Available “edit” options for an Editor user viewing the “Content” screen

7.3.2 Submitting the Draft

After making changes in the edit view of the selected node, an Editor user may save the new draft as either “Draft” or “Needs Review”.

Saving the node as “Draft” will retain any of the changes made to the content, but those changes will not be visible to unauthenticated site visitors until an authorized user approves it to the “Published” moderation state.

Marking the node as “Needs Review” will push the content into the Workflow process, highlighting it for an authorized user who is then able to set the moderation state to either “Published” (making it visible to an unauthenticated site visitor), or revert it back to “Draft” state (leaving the updated node in its unpublished state).



To save a new draft of an existing node as “Needs Review”:

- Select a content item to edit
- Make any necessary changes
- Select **Moderation state > Needs Review** from the “Publishing options” tab at the bottom of the node
- Select **Save**



8. System Glossary

Breadcrumbs: A trail of links which serve as a navigational aid for a user; breadcrumb trail represents hierarchical structuring of node's location on the site

Content Type: A template with defined fields to capture data in a controlled way; creates consistent display of content across a site

Menus: A navigational tool for a site visitor to use to explore more content; examples include the primary (main menu) navigation, as well as the enterprise footer navigation

Moderation State: The different workflow states of a node (Draft, Needs Review, Published); moderation options available to a user depend on a user's permissions; once a node has been published, a user can still edit the node and create new revisions

Node: Any individual piece of content, such as a Document, Press Release, or Site Page that is stored in the CMS; synonymous with what you would call a "web page"

Parent Item: A node that has been designated as the starting point (highest level) of a breadcrumb trail

Permissions: Individual user allowances and restrictions for each aspect of the CMS (e.g., node permissions, file permissions, image permissions, taxonomy permissions, etc.) that are set up and maintained by an Admin user

Required Field: A field that must be populated with content in order for user to save the node; these fields are set off by an asterisk on a node's edit view

Taxonomy: Drupal's tagging system; each Taxonomy vocabulary has a hierarchical set of terms that can be assigned to different content types by an Admin user, and added by any user when creating content

Term: Individual tag of a specific Taxonomy vocabulary

Vocabulary: The hierarchical set of terms ("tags") that make up a specific set of Taxonomy terms

